Discretionary Grant Web Portal User Guide for Grant Applicants

Wisconsin Department of Public Instruction
Division for Learning Support
Special Education Team
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I.   Getting Started

Welcome to the **IDEA Discretionary Grant Web Portal User Guide**. The Portal is the means for fiscal agents to access all the IDEA Discretionary Grants awarded to that agency by the Wisconsin Department of Public Instruction (DPI) and to submit applications for future grant projects. This documentation provides the user with all the information required to be able to submit applications and access grant information.

Browser Standard

The web-based system requires that the version of your internet browser meet a minimum standard. Browser upgrades are generally free from your provider. This standard has been set to ensure the ability to run SSL, a 128-bit encrypted standard for the transmission and receipt of the data. This is done to protect the privacy and security of the information being transmitted.

Grant Coordinator: Login and Assign Users

1. One individual will be assigned the **Grants Coordinator** role at the fiscal agency. The Grants Coordinator will be the only individual at the fiscal agency assigned a Login ID and password by DPI. This information will be emailed to the Grants Coordinator.

The Grants Coordinator will be responsible for setting up all other users at that fiscal agency. The Grants Coordinator will have access to all IDEA Discretionary Grant Projects applications and will have the ability to activate and de-activate users within that fiscal agency.

2. To enter the Portal, open your web browser and enter the following address:

   https://www2.dpi.state.wi.us/egrants/Portal/SignIn.aspx

3. A login dialog box appears requesting the user's login ID and password.

4. Enter the **Login ID** and **Password** assigned to you and click on the **Sign In** button. The login ID and password used by the Grant Coordinators are assigned by DPI. The password is not case-sensitive; letters may be entered as all upper- or all lower-case.

   📝 **Note: The first time you enter the Portal, you will be asked to change your password.**

5. The **Grant Web Portal Main Menu** will be displayed. The Grant Web Portal Main Menu is specific to each fiscal agent. The fiscal agent (e.g. CESA 1) is listed at the top of this page. This page will list all the IDEA Discretionary Grant Projects for which this fiscal agent is eligible to apply.

Department of Public Instruction
Grant Web Portal Main Menu
Cooperative Ed Serv Agcy 01

User Info
User Name:
Login ID:
Role: DPI Grants
                Administrator

User Administration
Add User
Update User
Reset Password
Re-Activate User

Grant Project Maintenance
Add Project
Update Project
Assign Fiscal Agent to Project
Upload NOFA

Administrator Menu
Equipment Categories
Add Fiscal Agent
Change Role

Notice of Funding Availability (NOFA)

Project Name/Number	Start Date	End Date	Award
Regional Service Network (CESA 1)			
12-74-9901-IDEA10	07/01/2011	06/30/2012	
Early Childhood Regional Program Support Leadership & Large LEA Networking (CESA 1)			
12-74-9901-PIDEA60	07/01/2011	06/30/2012	

Active Grant Projects

Project Name/Number	Status	End Date	Award

Archived Grant Projects

Project Name/Number	End Date	Award

| Exit Grant Application | Report A Software Problem |

User Administration
Add User
Update User
Reset Password
Re-Activate User

6. On the left side bar is box called **User Administration.**

7. Click on **Update User.** This will bring up a screen entitled **Maintain User Information.**

You will see your name (as Grants Coordinator) listed below. On this same line, click on the **Edit** link to view your full contact information. If any of this information is inaccurate, revise it and click the **Update User** button to save the information. You may also revise your password here. Then click **Return to Main Menu** at the bottom of the screen to return to the Grant Web Portal Main Menu.

8. On the left side bar, under **User Administration,** now click on **Add User.** This brings up a screen entitled **Add New User.** This is where the Grant Coordinator may add other users within this fiscal agency. There is no limit to the number of users that may be added here.

There are three roles available to which additional users may be assigned:

1.) Grant Project Director (be sure to add one Grant Project Director for each grant project)

2.) Grant Accountant (such as a Business Office Manager)

3.) Read Only User

9. For each new user, provide the information for each of the required fields:
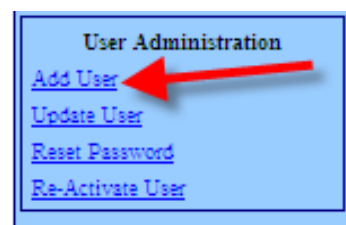
> **First Name**

> **Last Name**

> **User Role** (choose from the drop down menu)

> **Login ID** (create a unique Login ID for each user)

> **Password** (nothing needs to be added here)

> **Email address**

> **Phone Number**

> **Fiscal Agent:** Assign from the dropdown list (example: CESA 1)

Note: The default password will always be "password." The user will be asked to update their password when first logging into the Portal.

10. Then click the **Add User button.** This user will now be saved in the Portal. It is now the Grant Coordinator's responsibility to communicate to each user their Login ID and password and the Portal address. The activated users may now access the portal and submit the application materials (see instructions beginning on page 7).

11**.** Click **Exit Grant Application** at the bottom to log off.

Note: The Portal is set up so that the Grant Coordinator and Grant Accountant can view all projects for that Fiscal Agency. The Project Directors will only be able to view the projects to which they are assigned. This feature exists as a privacy protection.

II. Submitting an Application

Grant Project Director Login:

1. As the **Grant Project Director** or other user, the Grant Coordinator at your Fiscal Agency should provide you a Login ID and Password.

2. To enter the Portal, open your web browser and enter the following address:

    https://www2.dpi.state.wi.us/egrants/Portal/SignIn.aspx

3. A login dialog box appears requesting the user's **Login ID** and **Password.**

4. Enter the **Login ID** and **Password** assigned to you and click on the **Sign In** button. The password is not case-sensitive; letters may be entered as all upper- or all lower-case.

    Note: The first time you enter the Portal, you will be asked to change your password.

    Note: To get set up as a Portal user with a login ID and password, contact your agency's Grant Coordinator.

5. The **Grant Web Portal Main Menu** will be displayed.

Viewing All Agency Grants: Grant Web Portal Main Menu

The **Grant Web Portal Main Menu** is specific to each fiscal agent. The fiscal agent (e.g. CESA 1) is listed at the top of this page. This page will list all the IDEA Discretionary Grant Projects for which this fiscal agent is eligible to apply.

The **Grant Web Portal Main Menu** contains three (3) sections plus a sidebar:

Section 1 – Notice of Funding Availability

This section lists the grant applications. These are the grant projects that are in the application stage and have yet to be approved by DPI. The applications are displayed in a grid format. The grid displays the following information:

1. **Project Name/ Number**
   (e.g. Regional Service Network, 12-74-9901-IDEA10)

2. **Start Date**
   This is the date the grant period begins.

3. **End Date**
   This is the date the grant period ends.

4. **Award**
   This is the total award amount available for this grant.

Section 2 – Active Grant Projects

When a grant project is approved by DPI – when the grant award notification is sent and when the fiscal year (or grant period) begins -- the project will moved to this section. When a grant project is moved to this section, the "Project Income" and "Claims" sections of the Portal will be activated.

Section 3 – Archived Grant Projects

When the fiscal year (or grant period) is completed, the grant project will be moved to this section and archived. The fiscal agent will therefore have access to past IDEA Discretionary Grant Project for viewing only.

Sidebar

This left sidebar contains the following sections:
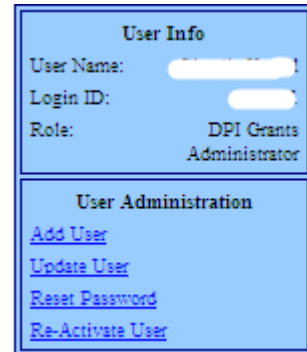
> **1. User Info**
> This section lists the current user's name, login ID and role.
>
> **2. User Administration**
>
> This section will be available to the DPI Grants Administrators and the Grants Coordinator only. This is where the Grants Coordinator can add more users and assign their login and password information.
>
> This section contains four links:
>
> - Add User
> - Update User
> - Reset Password
> - Re-Activate User

Add User– Clicking on this link allows the Grants Coordinator to add individuals within the fiscal agency to become a user and have access the portal. There is no limit to the number of users that that may be added.

Then the Grants Coordinator will be able to assign a role for each user. The four user roles available in the drop down menu include the following:

1. Grant Coordinator (assigned by DPI)
2. Grant Director (the Project Director or Coordinator for that grant project)
3. Fiscal Agent Accountant (such as a Business Office Manager)
4. Read Only User (this user will only be able to view the grant information but not make changes   to the application)

Here the Grants Coordinator will also be able to assign that user a login and password and add their contact information. Then click the "Add User" button, and that information will be saved. The newly added user will then be able to login and access the Portal.
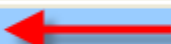
Update User – Clicking this link allows the Grants Coordinator to revise the information stored for any user, including contact information.

Reset Password – Clicking this link takes the Grants Coordinator to the same page as "Update User" and allows the Grants Coordinator to re-set any user's password.

Re-Activate User – Clicking this link allows the Grants Coordinator to de-activate or re-activate any user for that fiscal agency. This allows the Grants Coordinator to control who has access to the grant information. To deactivate a district user, the active user check mark should be deselected.

Viewing a Grant Project: Grant Project Main Menu

- From the **Grant Web Portal Main Menu**, click on the highlighted name of the grant project.

Notice of Funding Availability (NOFA)

Project Name/Number	Start Date
Regional Service Network (CESA 1)	
12-74-9901-IDEA10	07/01/2011
Early Childhood Regional Program Support Leadership & Large LEA Networking (CESA 1)	
12-74-9901-PIDEA60	07/01/2011

Note: If you are unable to access your project, contact your agency's Grant Coordinator who must first assign you to this project.

You will then be taken to the **Grant Project Main Menu** page. This page is specific to each grant project and only includes information about that specific grant project.

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Test
Regional Service Network (CES

The most important sections for the grant applicant are the four first sections:

1.) Grants Main Menu: This is the only section you will be using in the grant application process. This section will allow you to submit a grant budget, application/work plan and assurances.

Grants Main Menu

Grant Budget
View Notification of Funding Amount (NOFA)
View Assurances / Certification
View Workplan/Application
Upload Completed Assurance/Work Plan
Enter/View Grant Project Contacts

2.) Grant Project Income: This section will not be accessible during the application phase. It will be accessible once the grant has been awarded. This section allows the grantee to record and budget project income, if the grantee has been approved to earn program income.

Grant Project Income

Record Project Income
Budget Project Income

3.) Claim Funds: This section will not be accessible during the application phase. It will be accessible only once the grant has been awarded. This section allows the grantee to claim grant funds. It also allows the grantee to "claim" project income if applicable (i.e. to show how it has been spent).

Claim Funds

Enter Claims for Grant Funds
Enter Claims for Project Income

Report Menu

View Budget Detail Report

4.) Report Menu: Under the **Report Menu** section, click on the link **View Budget Detail Report** to view a complete summary of your grant budget. This page may be printed to review the budget before submitting.

1.) Grants Main Menu

The Grants Main Menu displays the following links used for navigating within the IDEA Discretionary Grants budget application:

Grant Budget: Click on this link to access the grant project budget. Here you can enter budgeted items for the categories of personnel, purchased services, non-capital objects, capital objects, insurance, and other objects. See page 14 for more detailed information about this section.

Grants Main Menu

Grant Budget

View Notification of Funding Amount (NOFA)

View Assurances / Certification

View Workplan/Application

Upload Completed Assurance/Work Plan

Enter/View Grant Project Contacts

View Notice of Funding Availability
(NOFA): Click on this link to download a PDF version of the Notice of Funding Availability (NOFA) specific to this grant project. This document contains the funding award amount; the grant project purpose, goals and required activities; the grant guidelines and funding limitations; reporting requirements; a list of and link to the application components; and instructions for each application component.

View Work Plan / Application: Click on this link to download a blank WORD version of the Work Plan. This document should be completed electronically and uploaded to the Portal.

View Assurance: Click on this link to download a blank WORD version of the Assurances and Certifications form. This form must be printed, signed by the agency's district administrator, and either faxed to DPI or scanned and uploaded to the Portal. An agency may not begin to encumber its IDEA discretionary grant dollars until the signed Assurances have been submitted to DPI.

Upload Completed Assurance / Work Plan: Click this link to access the **Grant Project Documentation Menu.** Here you will upload the completed documents as part of the IDEA Discretionary Grant application. You will upload your signed assurances and the completed PDF document version of the Work Plan here. You will also upload subsequent Work Plan revisions (Mid-Term and End-of-Year) as well as any other reporting documents here.

Grant Budget Menu
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Regional Service Network (CESA 1)

Grant Project Documentation		
Document Type:	Assurance	
Document Description:		
Find File:		Browse...
		Upload

Click on the 'Browse' button, find file and select the Upload button to upload The documentation

Document Type	Document Description	Action
Workplan / Application		View / Delete

To upload a document, choose **Document Type** from the dropdown menu. The options include the following: **Assurance**, **Work Plan/Application**, or **Other**. You have the option of adding a document description. It is recommended that you type "Initial Work Plan Application" when uploading the initial application document. When you submit Work Plan revisions, note the revision by date in this section. For example, type: *"Work Plan Revision- December 2012."*

Then go to **Find File** and browse to locate the document on your computer. Finally, click the **Upload** button to upload the document. The Portal can accept PDFs, Word documents, and Excel documents.

Once the document has been successfully uploaded, you will see it appear in the grid below. You should see **Document Type**, **Document Description**, and under **Action,** you may choose to view the uploaded document or delete it.

Choose the **Back** button when you are finished uploading documents to the Portal.

Enter / View Grant Project Contacts

Clicking on this link will bring you to a page entitled **Primary Contacts for Grant Application.**

This section allows DPI to quickly view the primary contacts for this grant project and for the grant project staff to quickly view the contact information of the DPI liaison. Here any activated user can assign certain users to be the primary contacts for this grant project.

Note: the Grant Coordinator MUST assign a user to each of these roles before they can have access to the grant application!

The roles of **Grant Coordinator**, **Grant Director** and **Fiscal Agent Accountant** are listed. Under each of these roles, assign an existing user from the drop down menu. This individual's phone and email contact information will populate automatically.

Primary Contacts for Grant Application		?
DPI Grant Liaison		
Name:		
Phone:	E-Mail:	
Grant Coordinator	●	
▼		
Phone:	E-Mail:	
Grant Director		
Shelly Smith ▼		
Phone: (555)555-5555 Ext:	E-Mail: smith@ttt.gov	
Fiscal Agent Accountant		
▼		
Phone:	E-Mail:	
Back		Save

The **Grant Director** is the primary Project Director of the grant project. The **Grant Coordinator** may be any other user, such as a CESA Administrator, who may have access to the grant application. The **Fiscal Agent Accountant** role will most likely be the Business Office Manager or accountant who will be assisting with the budget.

Be sure to **SAVE** at the bottom of the screen to save the users selected for each role.

To add a new user to the drop down list, exit to the **Grant Web Portal Main Menu** and click the **Add User** link on the left side bar.

> 📝 **Note:** Only the Grant Coordinator will be able to add new users to the Portal.

> 📝 **Note:** Even though multiple users may be added, only one Grant Coordinator, one Grant Director, and one Fiscal Agent Account may be listed on this page as the "Primary Contacts."

Viewing a Grant Project Budget

- From the **Grant Project Main Menu** page, within the **Grants Main Menu** section, click the first link - **Grant Budget**.

Grants Main Menu

Grant Budget   ←
View Notification of Funding Amount (NOFA)
View Assurances / Certification
View Workplan/Application
Upload Completed Assurance/Work Plan
Enter/View Grant Project Contacts

- This will allow you to access the actual budget software. This is where the budget contents are entered. This page has a menu at the top listing the budget categories, a left-hand sidebar, and two sections in the body of the page.

Grant Budget Menu
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Test
Regional Service Network (CESA 1)

Grant Project Main Menu --> Submit/Lock Budget --> Personnel --> Purchased Services --> Non-Capital Objects --> Capital Objects --> Insurance --> Other Objects --> Indirect --> Summary Report --> Submission History

Balance Reconciliation Sheet - Grant Budget   ←   (?)

Grant Funds Available	Grant Funds Budgeted	Difference
$137,304	$0	$137,304

Lock Budget

Budget Lock History   ←

Amendment #	Status	Locked Date	Review Date	Action
0	Unlocked			Edit

Balance Reconciliation Sheet - Grant Budget:
This is a table showing the total grant award amount under "Grant Funds Available," the amount of funds that have so far been budgeted under "Grant Funds Budgeted," and the difference between the two under "Difference."

Below this section is this button:

Submit/Lock Budget

Click this button to submit your budget when it is completed.

Budget Lock History

This section shows a grid with the history of your budget submissions. It includes the following sections:

➢ **Amendment Number:** The number is 0 for initial submission, 1, 2, 3, etc.

➢ **Status:** Approved or denied/ unlocked or locked

➢ **Locked Date**: Date the grant applicant submitted the initial budget application

    or budget revision

➢ **Review Date:** Date the DPI Grant Liaison reviewed the budget application or revision

➢ **Action:** Edit

User Info

User Name:	
Login ID:	
Role:	DPI Grants Administrator

Grant Info

Grant Number:	12-74-9901-IDEA10
Grant Status:	Inactive
Start Date:	7/1/2011
End Date:	6/30/2012

Grant Budget Summary

Amendment #:	0
Status:	Unlocked
Available:	
Budgeted:	$0
Remaining:	

Grant Section Summary

Personnel:	$0
Purchased Services:	$0
Non-Capital Objects:	$0
Capital Objects:	$0
Insurance:	$0
Other Objects:	$0
Indirect:	$0

Sidebar

The sidebar lists the following information:

- **User Info:**
This section lists the user's name, login ID and user's role either as the Grant Director, Grant Coordinator, Read Only User, or Accountant.

- **Grant Info:**
This section lists the grant number, current status (inactive, active or archived), start date and end date.

- **Grant Budget Summary:**
This section lists the budget amendment number, budget status (locked or unlocked), total dollars available, total dollars budgeted, and remaining dollars left to budget.

- **Grant Section Summary:**
This section lists how much is currently budgeted in each section of the grant budget

📝 **Note:** A status of locked means the budget has been submitted and is awaiting DPI review. Locked means submitted; once a budget has been locked, the grantee will not be able to make any revisions until the budget has been approved or denied by the DPI reviewer. Once the budget has been approved or denied, it will be automatically unlocked so the grantee can make revisions. A budget can only be amended when the status is unlocked.

Budget Categories / Sections:

There are nine (9) categories/sections to the budget, all listed in the menu at the top:

- Personnel
- Purchased Services
- Non-Capital Objects
- Capital Objects
- Insurance
- Other Objects
- Indirect
- Summary Report
- Submit/Lock Budget

Use the navigation bar to move from section to section by clicking on the appropriate section link. The navigation bar also has a link to return to the **Grant Project Main Menu** as well as a link to **Submit/Lock** the budget. **Submission History** returns you to the Grant Budget Menu page.

> 📝 **Note:** There is no "Save" button in the budget sections. Once you click the "Add" button, the budget items should be saved. You can log off the Portal and log back in to complete the budget and submit later.

Personnel Section

Follow these steps for entering budget information for the Personnel Section:

- Select the staff **Position** from the dropdown list. The positions have been generalized for all discretionary grant projects. The positions won't represent the individual's exact position title at the agency, but rather the role the individual holds for this discretionary grant (e.g. Project Director, Project Coordinator, Project Assistant, Clerical Staff, Bookkeeper, Tech Support, etc.). The Assignment category may be activated or inactivated depending on what position is chosen.

  Note: If you would like a position to be added to the drop down, email the DPI Grants Administrator.

- The **WUFAR Code & Description** for the staff position will be automatically populated.

- Enter the staff person's full **Name**

- The **Local WUFAR Detail** is an optional field that can be used to provide additional local accounting information such as a project code for the position being selected

- Enter the staff person's **Official Agency Position Title**. This is the title they hold at the fiscal agency.

- Under **Total Project Days**, enter the total number of days this staff person will work on the grant project

- Under **Total Agency Days,** enter the total number of days this staff person is employed at the agency

- Enter the **Salary** for the staff person. It is understood that the salary amount budgeted is an estimate.

- Enter the **Fringe** for the staff person. It is understood that the fringe amount budgeted is an estimate.

- Enter the **EFN** (Employee File Number, or License Number) for each staff person, if required.

- Click on the **Add** button when all fields are complete to save the record.

At the bottom of the page is a summary of the Personnel Section and a grant total of dollars budgeted within this section.

 Tip: Click on the "Edit" link under the "Action" heading for a budgeted item to activate the Update and Delete buttons.

 Note: If you have a question about positions or WUFAR codes, first visit the WUFAR Code Glossary and Budget Tips on page 45. If you still have question, contact the DPI Grants Administrator.

 Note: In certain grant projects, a license file number (EFN) is required for specific project positions. If this is the case, you won't be able to type in the name of that individual. Instead, type in his/her license number. Then click the "Add" button. You should see the entry below should automatically include the individual's name, if he/she holds a current DPI license. This ensures that an un-licensed individual will not be able to be added to the budget.

Purchased Services Section

Follow these steps for entering budget data for the Purchased Services Section:

- Select the **Type of Service** being purchased from the dropdown list.

- The **WUFAR Code & Description** for the purchased service will be automatically populated.

- The **Local WUFAR Detail** is an optional field that can be used to provide additional local accounting information such as a project code for the service being purchased.

- The **Person/Agency Providing Service** is required. If the service is a contracted service, list the agency or individual name of the contractor. If the service is consultant, list the name of the consultant. If this service is provided by fiscal agent receiving the grant, list the fiscal agent itself.

- Enter the **Cost** for the type of service being purchased. It is understood that the amounts budgeted here are estimates.

- Enter a **Detailed Description** of the type of service being purchased. The Description field needs to provide enough detail for DPI to understand how the money is being spent.

  For example, if the type of service being purchased is Professional Development, the person/agency providing the service field may indicate Various Presenters and the detailed description would indicate the topical training areas to be addressed (autism, TBI, behavior management).

- Click on the **Add** button when all fields are complete to save the record.

- At the bottom of the page is a summary of the Purchased Services Section and a grant total of dollars budgeted within this section

Tip: Click on the edit link for a budgeted item to activate the Update and Delete buttons.

Note: If you have a question about types of services or WUFAR codes, first visit the WUFAR Code Glossary and Budget Tips on page 45. If you still have question, contact the DPI Grants Administrator.

Non-Capital Object Section
Follow these steps for entering budget data for the Non-Capital Object Section:=

- Select the **Non-Capital Object** from the dropdown list.

  📝 **Note:** If non-capital equipment is being purchased, you will be asked to provide the equipment category from a drop down list (e.g. computers); the type of equipment (e.g. laptops), the total number of units (e.g. 3); and an assurance (e.g. these laptops will only be used for the purposes of this IDEA-funded grant project).

- The **WUFAR Code & Description** for the non-capital object will be automatically populated.

- The **Local WUFAR Detail** is an optional field that can be used to provide additional local accounting information such as a project code for the non-capital object.

- Enter the **Cost** for the non-capital object. It is understood that the amounts budgeted here are estimates.

- Click on the **Add** button when all fields are complete to save the record.

At the bottom of the page is a summary of the Non-Capital Objects Section and a grant total of dollars budgeted within this section

📝 **Tip:** Click on the edit link for a budgeted item to activate the Update and Delete buttons.

📝 **Note:** If you have a question about the non-capital objects or WUFAR codes, first visit the WUFAR Code Glossary and Budget Tips on page 45. If you still have question, contact the Grants Administrator.

Capital Object Section

Follow these steps to enter budget data for the Capital Object Summary:

- Select the **Capital Object** from the dropdown list.

- The **WUFAR Code & Description** for the capital object will be automatically populated.

- The **Local WUFAR Detail** is an optional field that can be used to provide additional local accounting information such as a project code for the capital object.

- Enter the **Cost** for the capital object. It is understood that the amounts budgeted here are estimates.

- Enter a **Detailed Description** of the capital object. The Description field needs to provide enough detail for DPI to understand how the money is being spent. For example, if purchasing Equipment, add details in this section regarding the number of units and the type of equipment (e.g. 2 laptops).

- Enter **Equipment Category** from the drop down list (e.g. computers)

- Enter the **Number of Units** of equipment (e.g. 3)

- Provide an **Assurance** in the text box that the equipment purchased with IDEA funds will be used only for the purpose of the grant and for the purposes of special education. Click on the Assurances link for some examples.

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- Click on the **Add** button when all fields are complete to save the record.

- At the bottom of the page is a summary of the Capital Objects Section and a grant total of dollars budgeted within this section

  - **Tip:** Click on the edit link for a budgeted item to activate the Update and Delete buttons.

  - **Note:** If you have a question about the capital objects or WUFAR codes, first visit the WUFAR Code Glossary and Budget Tips on page 45. If you still have question, contact the DPI Grants Administrator.

Insurance Section

Follow these steps to enter budget data for the Insurance Summary:

- Select the **Insurance** item from the dropdown list.

- Select the **WUFAR Code & Description** for the insurance item from the dropdown list, if available.

- The **Local WUFAR Detail** is an optional field that can be used to provide additional local accounting information such as a project code for the insurance item.

- Enter the **Cost** for the insurance item. It is understood that the amounts budgeted here are estimates.

- Enter a **Detailed Description** of the insurance item. The Description field needs to provide enough detail for DPI to understand how the money is being spent.

- Click on the **Add** button when all fields are complete to save the record.

At the bottom of the page is a summary of the Insurance Section and a grant total of dollars budgeted within this section.

Tip: Click on the edit link for a budgeted item to activate the Update and Delete buttons.

Other Objects Section

Follow these steps to enter budget data for the Other Objects Summary:

- Select the **Other Object** from the dropdown list.

- Select the **WUFAR Code & Description** for the other object from the dropdown list, if available.

- The **Local WUFAR Detail** is an optional field that can be used to provide additional local accounting information such as a project code for the other object.

- Enter the **Cost** for the other object. It is understood that the amounts budgeted here are estimates.

- Enter a **Detailed Description** of the other object. The Description field needs to provide enough detail for DPI to understand how the money is being spent.

- Click on the **Add** button when all fields are complete to save the record.

At the bottom of the page is a summary of the Other Object Section and a grant total of dollars budgeted within this section.

📝 **Tip:** Click on the edit link for a budgeted item to activate the Update and Delete buttons.

Indirect

Click on this link to view the Fiscal Agent's indirect rate to be charged against the IDEA discretionary grant budget. This negotiated rate is displayed on this page. In order to claim indirect costs on the IDEA grant projects, the agency must have a negotiated indirect rate established with DPI.

The indirect rate will be based on the 2011-12 indirect rate until the 2012-13 rate is established and finalized in December 2012. See the DPI's Indirect Cost Information. Questions about your agency's indirect cost rate may be directed to Eugene Fornecker at Eugene.Fornecker@dpi.wi.gov.

- **Amount Budgeted:** This line shows the total amount budgeted for this grant project

- **Budgeted Amount Against Which Indirect Costs May Be Calculated**
  (Excludes Capital Objects and Contract Amounts Above $25,000): This line shows the amount, out of the total amount budgeted, against which indirect costs may be charged. This amount excludes capital objects, as well as sub-grants and contracts over $25,000.

- **Total Amount Excluded from Indirect Calculation**
  (Includes Capital Objects and Contract Amounts Above $25,000):
  This line shows the amount excluded from the indirect calculation. It includes the total for all capital objects and all contracted and sub-grant amounts above $25,000.

- **Maximum Percentage Available for Indirect:** This line lists the Fiscal Agent's negotiated indirect rate with DPI.

- **Maximum Amount Available for Indirect:** This line shows the maximum amount available for indirect based on the maximum percentage available.

- **Indirect Cost:** This line shows the total amount being allocated for indirect costs within the grant budget.

For more information about indirect costs, go to
http://dpi.wi.gov/sped/pdf/indirect_cost_guid_idea_discgr.pdf.

Summary Report

The Summary Report electronically displays the estimated costs and WUFAR codes reported in the individual budget sections -- Personnel, Purchased Services, Non-Capital Objects, Capital Objects, Insurance, Other Objects, and Indirect. It also shows the total in each section and the grant total.

Submit Grant Budget for DPI Review

To submit the grant budget for review, follow these steps:

- Click on the **Submit/Lock Budget** link on the navigation bar.

Grant Budget
Cooperative Ed Serv Agcy
Test

Grant Project Main Menu --> Submit/Lock Budget Page --> Personnel --> Purchased Services --> Non-Capital Objects --> Capital Objects --> Insurance --> Other Objects --> Indirect --> Summary Report --> Submission History

Balance Reconciliation Sheet - Grant Budget

Grant Funds Available	Grant Funds Budgeted	Difference
$221,226	$203,660	$17,566

Submit/Lock Budget

Budget Lock History

Amendment #	Status	Locked Date	Review Date	Action
5	Unlocked			Edit
4	Approved	09/26/2011	09/28/2011	View
3	Approved		07/27/2011	View
2	Approved	07/21/2011	07/27/2011	View
1	Approved	07/21/2011	07/21/2011	View
0	Denied	06/01/2011	07/06/2011	View

- The **Grant Budget Menu** page will be displayed. In the main body of this page, the **Balance Reconciliation Sheet** section will be displayed. This section displays the total dollars available, the total dollars budgeted, and the total difference.

- If the budget is ready to be submitted for DPI review, click on the **Submit/Lock Budget** button.

  ✍ **Note:** "Locking" the budget is equivalent to submitting the budget.

  ✍ **Tip:** The software will not allow a budget to be submitted if the amount of money budgeted exceeds the estimated amount available.

- Once the grant budget has been submitted, the software is **locked** from making further updates until the DPI review is complete. The **Lock Budget** button has now been removed. Once the DPI review is complete, the budgets will be **unlocked** and available for amendment.

- The **Budget Lock History** located on this page records the lock dates as well as the review status of all prior budget submissions. To view a previously submitted budget, click on the **View** button for the submission. To continue working in the current unlocked budget, click on the **Edit** button for the budget.

- Click on **Edit Project Menu** to return to the main menu and then **Exit Grant Application** to exit the Portal.

- The Primary Contacts for the grant project will be notified by email if any revisions should be submitted to the budget or work plan.

III. Submitting Information After Grant Awarded

When a grant project is approved by DPI – when the grant award notification is sent and when the grant period begins -- the project will be moved to the **Active Grant Projects** section on the **Grant Web Portal Main Menu**.

When a grant project is moved to this section, the **Claims** sections of the Portal will be activated. Claims may now be submitted by the grantee. If the Program Income has been approved for a specific grant, the **Program Income** section will also be activated at this time.

A.   Claiming Grant Funds

To submit a claim for discretionary grant funds, login to the **IDEA Discretionary Grant Web Portal.**
On the **Grant Project Main Menu**, go to the **Claim Funds** section. Choose **Enter Claims for Grant Funds.**

Grants Main Menu

Grant Budget
View Notification of Funding Amount (NOFA)
View Assurances / Certification
View Workplan/Application
Upload Completed Assurance/Work Plan
Enter/View Grant Project Contacts

Grant Project Income

Record Project Income
Budget Project Income

Claim Funds

Enter Claims for Grant Funds ⬅
Enter Claims for Project Income

Report Menu

View Budget Detail Report

✎   **Note:** Claims are based on the last approved budget. Any modifications since then will not be displayed.

You will then see a screen entitled **Grants Budget Claims History.** In the body of the screen, you will see a grid that includes the field current status (new, submitted, approved, or returned), report type (partial or final), submittal date, approved date, report period ending date, funds claimed to date, and action (edit or view).

A "New" status means that a new claim can be created. Under action, choose the **Edit** link.

This will take you to a screen entitled **Grant Budget Claim.** You will fill in a radio button for "Type of Report," depending on whether this is a partial claim or final claim. If you choose **Partial Claim,** then enter the **Reporting Period Ending Date.** This is a required field and you will not be able to continue to the next step if a date is not entered.

The screen will show the **Total Funds Claimed to Date**: this is pre-populated with the last amount claimed through the web-based system. This may not be the amount of cash the agency has received to date. You may enter **Total Funds Received to Date** for your own reference. This is the amount the agency has received in cash from DPI.

When the required fields are entered, click **Save** to save your data. Or, alternatively, you can just click on **Next Step** to save your data and move on to the next step in the claim submission process.

INDIRECT: Indirect is claimed on the **Final Claim**. If **Final Claim** is selected from the Type of Report, then the approved budget indirect amount appears along with a field to enter the amount of requested indirect:

Wisconsin Dept of Public Instruction
Test Project #2

Grant Budget Claim

Type of Report: ○ Partial Claim   ⦿ Final Claim   ○ Revised Final Claim

Report Period Ending Date: 11/30/2011 ↺

Total Funds Claimed to Date:	$0.00	Total Funds Received to Date:	$0.00
Approved Indirect Cost Amount:	$0	Indirect Cost:	$0.00

| Back | Indirect amount pulled in from the last approved budget | Save | Amount of indirect the agency wishes to claim is entered here and then will appear in the expenditure report | Next Step |

When **Next Step** is selected from the previous screen, the expenditure report information is displayed:

Wisconsin Dept of Public Instruction
Test Project #2

Grant Budget Claim

Please Note: The budget items displayed are from the last approved budget. Any modifications made since then will not be displayed.

Sort By: ◉ Object ○ Function

Account Code	Account Name	Approved Budget	Unliquidated Encumbrances (Payables)	Previously Disbursed	Total Disbursements	Unencumbered Balance
27-100-221300-819	Professional Development	20,000.00	0	0.00	0	20,000.00
27-100-223300-819	Special Ed Coordination	20,000.00	0	0.00	0	20,000.00
27-200-221300-819	Professional Development	5,000.00	0	0.00	0	5,000.00
27-200-223300-819	Special Ed Coordination	4,000.00	0	0.00	0	4,000.00
27-100-221300-819	Professional Development	11,000.00	0	0.00	0	11,000.00
27-100-223300-819	Special Ed Coordination	12,000.00	0	0.00	0	12,000.00
27-100-221300-819	Professional Development	6,000.00	0	0.00	0	6,000.00
27-100-221300-819	Professional Development	5,000.00	0	0.00	0	5,000.00
27-100-270000-819	Insurance	16,000.00	0	0.00	0	16,000.00
27-100-223300-819	Special Ed Coordination	1,000.00	0	0.00	0	1,000.00
	Indirect Cost	0.00	0.00	0.00	0.00	0.00
	Total	100,000.00	0.00	0.00	0.00	100,000.00

| Back | Save Changes | Next Step |

- The **Approved Budget** column pulls the amounts from the last approved budget. If the amounts are not what you expected to see, a budget amendment will need to be submitted and approved before the amounts will change.

  The budget line items may be sorted either by "Object" or "Function" by selecting the radio button in the upper left-hand corner.

- The **Unliquidated Encumbrances** column is an optional column available for your own reference. DPI does not use any of the information entered into these fields, and they are not required.

- The **Total Disbursements** column is pre-populated with the amounts that were in the last submitted claim. This is where the grantee enters in the amount to be claimed for this time period.

- The **Unencumbered Balance** will display the unencumbered amount you have left to claim.

This column shows the total disbursements cumulatively, so you add the amount being claimed during the current period to the amount that has already been claimed. The software will not allow you to enter in less than the amount previously claimed. You will receive an error message if you attempt to do this. However, the grantee can make changes (even reductions) to individual budget lines, but the grantee cannot claim less overall than previously claimed.

- At any time during this process, you can select the **Save Changes** button and leave the software.

- Click on **Next Step** to complete the claim submission process.

- 📝 **Note:** If at any point during the process you wish to go back and make changes to the figures that were entered into the claim form, simply click on the back button and make the necessary changes.

The final screen includes the amounts entered from the previous screen. Select **Submit Claim** if you are satisfied with the information displayed. Read the assurance at the top; by submitting the claim you are certifying that this information is true, complete and accurate.

		Wisconsin Dept of Public Instruction Test Project #2			

Submit Grant Budget Claims

By submitting this claim, I certify that it is true, complete, and accurate to the best of my knowledge. I am aware that any false, fictitious, or fraudulent information may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001)

Submit Claim

Account Code	Account Name	Approved Budget	Unliquidated Encumbrances (Payables)	Total Disbursements	Unencumbered Balance
27-100-221300-819	Professional Development	20,000.00	10,000.00	0.00	10,000.00
27-100-221300-819	Professional Development	11,000.00	0.00	0.00	11,000.00
27-100-221300-819	Professional Development	6,000.00	0.00	0.00	6,000.00
27-100-221300-819	Professional Development	5,000.00	0.00	0.00	5,000.00
27-100-223300-819	Special Ed Coordination	20,000.00	10,000.00	0.00	10,000.00
27-100-223300-819	Special Ed Coordination	12,000.00	0.00	0.00	12,000.00
27-100-223300-819	Special Ed Coordination	1,000.00	0.00	0.00	1,000.00
27-100-270000-819	Insurance	16,000.00	0.00	0.00	16,000.00
27-200-221300-819	Professional Development	5,000.00	2,500.00	0.00	2,500.00
27-200-223300-819	Special Ed Coordination	4,000.00	4,000.00	0.00	0.00
	Indirect Costs	$0.00	0.00	$0.00	$0.00
	Totals:	100,000.00	26,500.00	0.00	73,500.00

Back   **View PI-1086**

- At the bottom of the screen, there is a button to print the **PI-1086**. This will pull up a printable version of the form with your data entered. You **do not** need to e-mail or fax this form unless this is a final claim; it is for your use only.

- Once the claim has been submitted, the status of the claim changes from **New** to **Submitted.** No additional claims for this funding source can be submitted until this claim has been processed and approved by the DPI accountant.

  As long as the status says **Submitted** rather than **In Process**, the agency user has the ability to go in and make changes to this claim (by clicking the **Edit** button) and re-submitting the claim by clicking on the **Re-Submit Claim** button.

| | | | Cooperative Ed Serv Agcy 01 | | | |
| | | | Claudia's Test Project | | | |

| | | | Grants Budget Claims History | | | |

Current Status	Report Type	Submittal Date	Approved Date	Report Period Ending Date	Funds Claimed to Date	Action
Approved	Partial Claim	08/11/2011	08/11/2011	10/31/2011	$0.00	View
Submitted	Partial Claim	08/11/2011		05/05/2012	$50,000.00	Edit

Back

The claim is then processed and approved or denied at DPI. When the claim has gone through this process, the status will change to **Approved** or **Returned.**

If the claim has been approved, an additional row will appear with the status of **New**. This means that a new claim may now be submitted for this funding source. If the status is **Returned**, DPI has requested that changes be made to the submitted claim.

Final Claims
Final claims require a signature of the agency administer. When **Final Claim** is selected as the Report Type and the claim is submitted, the following message appears: *The District Administrator must sign and Fax or Mail the PI-1086 to the Department of Public Instruction. Failure to do so will delay payment of the final claim*.

At this point, click on the button **View PI-1086,** print the claim form and get it signed. The signed claim can either be postal mailed or faxed to DPI at the address and numbers included on the claim form.
 A signed pdf copy of the claim e-mailed to DPI is also acceptable.

- **Note:** If the current status has not changed to **Submitted**, then your claim has not been submitted to DPI.

- **Note:** The budget software is designed in accordance with DPI's aids and audits budgeting rules, including the 10% rule for requiring amendments. Claims will need to be submitted quarterly. An agency has the option of submitting claims on a more frequent basis than quarterly.

B.   Submitting Grant Project Income Information

This section allows grantees to track project income (also called program income). This section will be available in the Portal only if DPI has approved the grant to earn project income through the application process.

For a full explanation of Project Income, go to **www.dpi.wi.gov/sped/grt_disc.html#techasst**.

There are three components of this tracking system:

1. First, the grantee records what income was earned on grant-related activities. This income will be recorded at the time when income is earned.

2. Second, the grantee budgets for how that project income will be spent on grant-related activities.

3. Finally, the grantee "claims" project income in the sense that the grantee shows how the income was actually spent during the grant period.

The **Grant Project Income** section (including Record Income section, Project Income Budget, and Project Income Claims) will be SEPARATE from the regular grant budget and claims. This system will provide a transparent way for agencies to share with DPI how income is being generated and spent on the IDEA discretionary grant project.

- Return to the **Grant Project Main Menu**

- Go the **Grant Project Income** section. Here you will see two links: **Record Project Income** and **Budget Project Income.**

- Select **Record Project Income.** This will bring up a page entitled **Record Grant Project Income.** At the time when grant project income is earned (i.e. during the grant period only), the income is recorded here.

Grant Budget Menu
Cooperative Ed Serv Agcy 01
Test
Regional Service Network (CESA 1)

Grants Main Menu

Grant Budget

View Notification of Funding Amount (NOFA)

View Assurances / Certification

View Workplan/Application

Upload Completed Assurance/Work Plan

Enter/View Grant Project Contacts

Grant Project Income

Record Project Income

Budget Project Income

Note: This section will be activated once the Discretionary Grant Application has been approved and the grant period begins. Therefore, it will not be accessible during the application phase.

Note: Project income is recorded at the time it is earned. Project income may be budgeted at any time during the grant period. Project income should be "claimed" at the time it is spent. All project income must be budgeted and claimed by the last day of the grant period. If all income is not spent by this date, the total grant award amount must be reduced by the remaining amount of project income.

Note: The income-generating activities listed in the **Record Project Income** section are taken from the activities specified in your Application/Work Plan as generating income. Therefore, these income-generating activities must be approved by your DPI Grants Liaison before they are implemented and before income can be earned. If you want to add additional income-generating activities, a work plan revision must first be submitted and approved by your DPI Grants Liaison.

Record Project Income

At the time when grant project income is earned (i.e. during the grant period only), the income is recorded on this page:

- Select the **Income Generating Activity** from the drop down box.

- Add the **Account Number** associated with this income-generating activity. This number should be the internal number used to identify this income on the fiscal agent's internal ledger. The purpose of adding it here is for DPI's monitoring purposes.

- Record the exact **Project Income Amount** earned from this activity

- Provide a **Detailed Description** of exactly how income was earned from this activity.

    For example, "Indicator 13 training/conference in October had a registration fee of $50 per participant. 250 participants attended and $12,500 gross income was earned from this conference. The total conference cost was $10,000. Thus, $2,500 in net income was earned from this activity."

- Click the **Add** button when all fields are complete to save the record. The DPI Liaison will review the recorded project income and will contact the grantee with any questions or concerns.

- The **Income Generating Activities** will be summarized at the bottom of this page, with a total of all project income totaled.

- The grantee does not have to select a **submit** button to submit a record of project income.
  The DPI grant liaison will be notified when project income is recorded. He/she may contact you with any questions, but there is no approval process for this section

- Click **Grant Project Application Menu** at the top to return to the previous page.

Tip: Click on the edit link for a budgeted item to activate the Update and Delete buttons.

Budget Project Income

Once you record project income earned, you will be able to budget this income at any point throughout the grant period (July 1 – June 30).

- On the **Grant Project Application Menu** page, under the **Grant Project Income** section, select the **Budget Project Income** link.

Regional Service Network (CESA 1)

Grants Main Menu

Grant Budget

View Notification of Funding Amount (NOFA)

View Assurances / Certification

View Workplan/Application

Upload Completed Assurance/Work Plan

Enter/View Grant Project Contacts

Grant Project Income

Record Project Income

Budget Project Income ⬅

- This will take you to the **Project Income Budget.**

Grant Budget Menu
Cooperative Ed Serv Agcy 01
Test
Regional Service Network (CESA 1)

Grant Project Main Menu --> Submit/Lock Budget --> Personnel --> Purchased Services --> Non-Capital Objects --> Capital Objects --> Insurance --> Other Objects --> Indirect --> Summary Report --> Submission History

Balance Reconciliation Sheet - Grant Project Income ?

Project Income Available	Project Income Budgeted	Difference
$0	$0	$0

Lock Budget

Budget Lock History

Amendment #	Status	Locked Date	Review Date	Action
0	Unlocked			Edit

- The **Project Income Budget** looks identical to the regular Grant Budget.

- Follow the same guidance to develop and submit the Project Income Budget as for the Grant Budget (refer to pages 14 - 28 of this guide)

- The objects and services (Personnel, Purchased Services, Non-Capital Objects, Capital Objects, Insurance and Other Objects) in this budget can only go to support approved grant activities listed in the Work Plan. Indirect is not included as an option for the Project Income budget.

- If you click **Submission History,** under the **Balance Recognition Sheet** section, you will see the total project income available, the amount budgeted, and the difference. The total project income available to be budgeted originates from the project income you recorded in the previous section.

📝 **Note**: The objects and services in this budget can only go to support approved grant activities listed in the Work Plan. If additional activities are planned, the Work Plan must first be revised and approved by the DPI Grants Liaison.

Submit Project Income Budget for DPI Review

To submit the project income budget for DPI review, follow these steps:

- Click on the **Submit/Lock Budget** link on the navigation bar. The DPI Grant Liaison will review and approve or deny the Project Income Budget.

- The **Project Income Budget Menu** page will be displayed. In the main body of this page, the **Balance Reconciliation Sheet** section will be displayed. This section displays the total dollars available, the total dollars budgeted, and the total difference.

- If the budget is ready to be submitted for DPI review, click on the **Lock Budget** button.

    🖉 **Tip:** The software will not allow a budget to be submitted if the amount of money budgeted exceeds the estimated amount available.

- Once the project income budget has been submitted, the software is **locked** from making further updates until the DPI review is complete. Once the DPI review is complete, the budget will be **unlocked** and available for amendment. The DPI liaison will contact the grantee if any revisions are required.

- The **Budget Lock History** located on this page records the lock dates as well as the review status of all prior budget submissions. To view a previously submitted budget, click on the **View** button for the submission. To continue working in the current unlocked budget, click on the **Edit** button for the budget.

Regional Service Network (CESA 1)

Grant Project Main Menu --> Submit/Lock Budget --> Personnel --> Purchased Services --> Non-Capital Objects --> Capital Objects --> Insurance --> Other Objects --> Indirect --> Summary Report --> Submission History

Balance Reconciliation Sheet - Grant Project Income (?)

Project Income Available	Project Income Budgeted	Difference
$0	$0	$0

<center>[Lock Budget] ←</center>

Budget Lock History

Amendment #	Status	Locked Date	Review Date	Action
0	Unlocked			Edit

Claiming Project Income

After the Project Income Budget has been approved, the grantee will be able to submit "claims" to show how the project income was actually spent on grant activities. Go to the **Grant Budget Menu.** Under **Claim Funds**, select **Enter Claims for Project Income.**

**Grant Budget
Cooperative Ed Serv Agcy 05
Test
RtI Center**
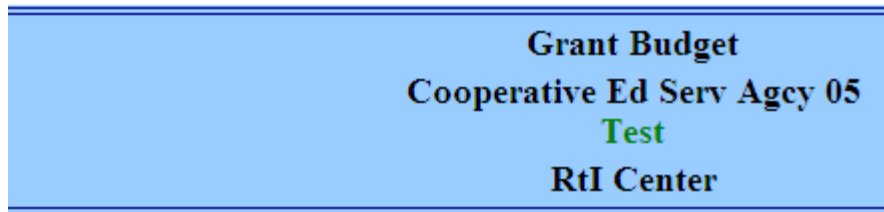
Grants Main Menu

Grant Budget
View Notification of Funding Availability (NOFA)
View Assurances / Certification
View Workplan/Application
Upload Completed Assurance/Work Plan
Enter/View Grant Project Contacts

Grant Project Income

Record Project Income
Budget Project Income

Claim Funds

Enter Claims for Grant Funds
Enter Claims for Project Income

> **Note:** Project income should be "claimed" at the time it is spent. All project income must be budgeted and claimed by the last day of the grant period (June 30). If all income is not spent by this date, the total grant award amount must be reduced by the remaining amount of project income.

Wisconsin Dept of Public Instruction
Test Project #2

Grants Budget Claims History

Current Status	Report Type	Submittal Date	Approved Date	Report Period Ending Date	Funds Claimed to Date	Action
New					$0.00	Edit

[Back]

| Report Menu | Return to Budget Menu | Exit to Project Menu |

You will then see a screen entitled **Project Income Budget Claims History.** In the body of the screen, you will see a grid that includes the field current status (new, submitted, approved, or returned), report type (partial or final), submittal date, approved date, report period ending date, funds claimed to date, and action (edit or view).

A "New" status means that a new claim can be created. Under action, choose the **Edit** link.

This will take you to a screen entitled **Project Income Budget Claim.** You will fill in a radio button for "Type of Report," depending on whether this is a partial claim or final claim. If you choose **Partial Claim,** then enter the **Reporting Period Ending Date.** This is a required field and you will not be able to continue to the next step if a date is not entered.

The screen will show the **Total Funds Claimed to Date**: this is pre-populated with the last amount claimed through the web-based system. This may not be the amount of cash the agency has received to date. You may enter **Total Funds Received to Date** for your own reference. This is the amount the agency has received in cash from DPI.

When the required fields are entered, click **Save** to save your data. Or, alternatively, you can just click on **Next Step** to save your data and move on to the next step in the claim submission process.

Wisconsin Dept of Public Instruction
Test Project #2

Grant Budget Claim

Type of Report: ⦿ Partial Claim   ○ Final Claim   ○ Revised Final Claim

Report Period Ending Date: [   ] ↺

Total Funds Claimed to Date: $0.00   Total Funds Received to Date: [$0.00]

[Back]   [Save]   [Next Step]

When **Next Step** is selected from the previous screen, the expenditure report information is displayed:

<div align="center">

Wisconsin Dept of Public Instruction
Test Project #2

Grant Budget Claim

</div>

Please Note: The budget items displayed are from the last approved budget. Any modifications made since then will not be displayed.

Sort By: ● Object ○ Function

Account Code	Account Name	Approved Budget	Unliquidated Encumbrances (Payables)	Previously Disbursed	Total Disbursements	Unencumbered Balance
27-100-221300-819	Professional Development	20,000.00	0	0.00	0	20,000.00
27-100-223300-819	Special Ed Coordination	20,000.00	0	0.00	0	20,000.00
27-200-221300-819	Professional Development	5,000.00	0	0.00	0	5,000.00
27-200-223300-819	Special Ed Coordination	4,000.00	0	0.00	0	4,000.00
27-100-221300-819	Professional Development	11,000.00	0	0.00	0	11,000.00
27-100-223300-819	Special Ed Coordination	12,000.00	0	0.00	0	12,000.00
27-100-221300-819	Professional Development	6,000.00	0	0.00	0	6,000.00
27-100-221300-819	Professional Development	5,000.00	0	0.00	0	5,000.00
27-100-270000-819	Insurance	16,000.00	0	0.00	0	16,000.00
27-100-223300-819	Special Ed Coordination	1,000.00	0	0.00	0	1,000.00
	Indirect Cost	0.00	0.00	0.00	0.00	0.00
	Total	100,000.00	0.00	0.00	0.00	100,000.00

| Back | | Save Changes | | Next Step |

- The **Approved Budget** column pulls the amounts from the last approved budget. If the amounts are not what you expected to see, a budget amendment will need to be submitted and approved before the amounts will change.

  Note: The budget line items may be sorted either by "Object" or "Function" by selecting the radio button in the upper left-hand corner.

- The **Unliquidated Encumbrances** column is an optional column available for your own reference. DPI does not use any of the information entered into these fields, and they are not required.

- The **Total Disbursements** column is pre-populated with the amounts that were in the last submitted claim. This is where the grantee enters in the amount to be claimed for this time period.

Note: his column shows the total disbursements cumulatively, so you add the amount being claimed during the current period to the amount that has already been claimed. The software will not allow you to enter in less than the amount previously claimed for each line item.

- At any time during this process, you can select the **Save Changes** button and leave the software.

- Click on **Next Step** to complete the claim submission process.

- **Note:** At any point during the preceding process you wish to go back and make changes to the figures that were entered into the claim form, simply click on the back button and make the necessary changes.

The final screen includes the amounts entered from the previous screen. Select **Submit Claim** if you are satisfied with the information displayed. Read the assurance at the top; by submitting the claim you are certifying that this information is true, complete and accurate.

Wisconsin Dept of Public Instruction
Test Project #2

Submit Grant Budget Claims

By submitting this claim, I certify that it is true, complete, and accurate to the best of my knowledge. I am aware that any false, fictitious, or fraudulent information may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001)

Submit Claim

Account Code	Account Name	Approved Budget	Unliquidated Encumbrances (Payables)	Total Disbursements	Unencumbered Balance
27-100-221300-819	Professional Development	20,000.00	10,000.00	0.00	10,000.00
27-100-221300-819	Professional Development	11,000.00	0.00	0.00	11,000.00
27-100-221300-819	Professional Development	6,000.00	0.00	0.00	6,000.00
27-100-221300-819	Professional Development	5,000.00	0.00	0.00	5,000.00
27-100-223300-819	Special Ed Coordination	20,000.00	10,000.00	0.00	10,000.00
27-100-223300-819	Special Ed Coordination	12,000.00	0.00	0.00	12,000.00
27-100-223300-819	Special Ed Coordination	1,000.00	0.00	0.00	1,000.00
27-100-270000-819	Insurance	16,000.00	0.00	0.00	16,000.00
27-200-221300-819	Professional Development	5,000.00	2,500.00	0.00	2,500.00
27-200-223300-819	Special Ed Coordination	4,000.00	4,000.00	0.00	0.00
	Indirect Costs	$0.00	0.00	$0.00	$0.00
	Totals:	100,000.00	26,500.00	0.00	73,500.00

Back **View PI-1086**

- At the bottom of the screen, there is a button to print the **PI-1086**. This will pull up a printable version of the form with your data entered for your own reference.

- Once the claim has been submitted, the status of the claim changes from **New** to **Submitted.** No additional claims for this funding source can be submitted until this claim has been processed and approved by the DPI Grant Liaison.

  Note: Since no project income funds are actually held or submitted to DPI, the DPI Accountant does not review this section. The Grant Specialist and Grant Liaison will review this section.

Cooperative Ed Serv Agcy 01
Claudia's Test Project

Grants Budget Claims History

Current Status	Report Type	Submittal Date	Approved Date	Report Period Ending Date	Funds Claimed to Date	Action
Approved	Partial Claim	08/11/2011	08/11/2011	10/31/2011	$0.00	View
Submitted	Partial Claim	08/11/2011		05/05/2012	$50,000.00	Edit

Back

As long as the status says **Submitted** rather than **In Process**, the agency user has the ability to go in and make changes to this claim (by clicking the **Edit** button) and re-submitting the claim by clicking on the **Re-Submit Claim** button.

The claim is then processed and approved or denied by the DPI Grants Liasion. When the claim has gone through this process, the status will change to **Approved** or **Returned.**

If the claim has been approved, an additional row will appear with the status of **New**. This means that a new claim may now be submitted for this funding source. If the status is **Returned**, DPI has requested that changes be made to the submitted claim.

   Note: If the current status has not changed to **Submitted**, then your claim has not been submitted to DPI.

C.   Submitting Budget Revisions

To submit a budget revision, login the **Grant Web Portal.** Click on the specific grant project link. You will then be taken to the **Grant Project Main Menu**. Under the heading **Grants Main Menu,** click the first link: **Grant Budget.**

This will take you to the actual grant budget software. This is where the budget contents are entered. This page has a menu at the top listing the budget categories, a left-hand sidebar, and two sections in the body of the page.

You will see a section called **Balance Reconciliation Sheet** in the center. This section displays the total dollars available, the total dollars budgeted, and the total difference.

Below this you will also see a section entitled **Budget Lock History.** This section shows a grid with the history of your budget submissions. It includes the following sections:

➢ **Amendment Number:** The number is 0 for initial submission, 1, 2, 3, etc.
➢ **Status:** Approved or denied/ unlocked or locked
➢ **Locked Date:** Date the grant applicant submitted the initial budget application
    or budget revision
➢ **Review Date**: Date the DPI Grant Liaison reviewed the budget application or revision
➢ **Action:** Edit (if unlocked) or View (if locked). This allows one to access previous versions of the budget.

To revise an unlocked budget, click on the **Edit** link associated with the appropriate amendment number under the headline **Action**. This will allow you to access each individual budget section (personnel, purchased services, etc.)

and make revisions.

Once the discretionary grant budget has been submitted or "locked," the software prevents the grantee from making any further updates until the DPI review is complete. Once the DPI review is complete, the budget will be unlocked and available for amendment.

You can add new budget items by using the **Add** button. You can also click on the **Edit** link for existing budget items. This will allow you to update or delete each existing item in the budget. First make changes to the item, and then save the changes by clicking the **Update** button. Click the **Delete** button to delete the entire budget item.

You can see updated and newly added budget line items listed in the grid below each section (personnel, purchased services, etc) and highlighted in yellow.

Contracted Services	436000-Special Ed Payment		Blue Door Consulting	$10,000	Edit
Marketing of	Initiative				
*Contracted Services	436000-Special Ed Payment		Dr. Jeffrey Lewis/University of Wisconsin-Extension	$50,000	Edit
Strengthening Social Relationships and Social Infrastructure in Schools to Improve School Outcomes of African American Students Project-Youth Participatory Action Research (YPAR)					

Grant Budget
Cooperative Ed Serv Agcy

Grant Project Main Menu --> Submit/Lock Budget --> Personnel --> Purchased Services --> Non-Capital Objects --> Capital Objects --> Insurance --> Other Objects --> Indirect --> Summary Report --> Submission History

Purchased Services Section (300 Objects) - Grant Funds ⑦

Type of Service:	Conference/ Workshop - Presenter ▾	WUFAR & Description:	221300-Professional Development ▾
Local WUFAR Detail:		Person/Agency Providing Service:	
Cost:			
Detailed Description:			

When you are ready to submit a budget revision, click on the **Submit/Lock Budget** link in the top menu:

This will return you to the **Grant Budget Menu**. Click on the **Submit/Lock** button to submit the revision.

Grant Budget
Wisconsin Dept of Public Instruction
Test Project

Grant Project Main Menu --> Submit/Lock Budget --> Personnel --> Purchased Services --> Non-Capital Objects --> Capital Objects --> Insurance --> Other Objects --> Indirect --> Summary Report --> Submission History

Budget Has Changed to Amendment #: 2.

Balance Reconciliation Sheet - Grant Budget ⑦

Grant Funds Available	Grant Funds Budgeted	Difference
$0	$0	$0
	Lock Budget	

Budget Lock History

Amendment #	Status	Locked Date	Review Date	Action
2	Unlocked			Edit
1	Approved	05/23/2011	05/23/2011	View
0	Locked	05/23/2011	05/23/2011	View

D.   Submitting Work Plan Revisions/ Updates

To submit a work plan revision/update, login the **Grant Web Portal**. Click on the specific grant project link. You will then be taken to the **Grant Project Main Menu**. Under the heading, **Grants Main Menu,** click the link: **Upload Completed Assurance/ Work Plan.**

This will allow you to access the **Grant Project Documentation Menu.** Completed grant application documents as well as work plan updates will have been uploaded here:

Be sure to save each version of the work plan as a WORD document for your records.. Use the instructions in your grant's Notice of Funding Availability (NOFA) to complete the updates and revisions in the Word Document version of the Work Plan.

✎   **Note:** Refer to your project's Notice of Funding Availability for specific instructions regarding Work Plan revisions.

To upload a document, choose **Document Type** from the dropdown menu. The options include the following: **Assurance**, **Work Plan/Application**, or **Other**. You have the option of adding a document description. When you submit Work Plan revisions, note the revision by date in this section.
For example, type: *"Work Plan Revision- December 15, 2012."*

IV. WUFAR Glossary and Budget Tips

General

Below is a complete list of all the options for positions, services or objects available in the IDEA Discretionary Grant budget. Certain grant projects may have some options and not others depending on what is allowable for that project.

If the grant applicant needs an additional position, service or object added to their project's dropdown list or uses a different WUFAR code for a specific position, service or object, contact the DPI Grants Administrator directly.

The Web Portal software now requires many objects and services to be broken down and listed separately, such as workshop, conference, training and meeting costs. Travel must be distinguished according to project staff, consultant/contracted staff and participants.

A detailed description is required for most services and objects. The more detail provided in explanation of each service or object purchased, the better.

A good rule of thumb is to provide enough information in the detailed description so that an individual not familiar with the grant project would be able to understand what is being purchased.

View a full list of WUFAR functions available to CESAs in IDEA budgets:
  www.dpi.wi.gov/sped/pdf/fy11-cesa-functions.pdf

View a full list of WUFAR functions available to LEAs in IDEA budgets here:
  www.dpi.wi.gov/sped/pdf/fy11-lea-functions.pdf

Personnel

Position	Assignment	WUFAR Description	Explanation
Bookkeeper		252000-Fiscal	Salary and fringe costs of bookkeeper, accountant, or other business office staff whose activities are concerned with the fiscal operations of the agency. This is an individual employed by the agency (not a contractor). To be included as a direct cost, the individual must keep time & effort records to demonstrate time devoted to this grant project.
Clerical Staff		223300-Special Ed Coordination	Salary and fringe costs of administrative staff, clerical, or other support staff whose activities are concerned with the administration of the agency. This is an individual employed by the agency (not a contractor). To be included as a direct cost, the individual must keep time & effort records to demonstrate time devoted to this grant project.

Position	Assignment	WUFAR Description	Explanation
IT Support Staff		266000-Tech Services	Salary and fringe costs of IT staff whose activities are concerned with maintenance and development of technology of the agency. This is an individual employed by the agency (not a contractor). To be included as a direct cost, the individual must keep time & effort records to demonstrate time devoted to this grant project.
Project Staff	Director	221300-Professional Development	Salary and fringe costs of grant project staff, specifically the role of Project Director or equivalent. This is an individual employed by the agency (not a contractor).
Project Staff	Coordinator	221300-Professional Development	Salary and fringe costs of grant project staff, specifically the role of Project Coordinator or equivalent. This is an individual employed by the agency (not a contractor).
Project Staff	Assistant	221300-Professional Development	Salary and fringe costs of grant project staff, specifically the role of Project Assistant or equivalent. This is an individual employed by the agency (not a contractor).
Project Staff	Consultant	221300-Professional Development	Salary and fringe costs of grant project staff, specifically role of Project Consultant or equivalent. This is an individual employed by the agency (not a contractor).

📝 **Note: The salary and fringe benefits of an administrator/supervisor cannot be charged to federal grants.**

Purchased Services

Type of Service	WUFAR Description	Explanation
Communications – Internet – Direct Program Costs	223300 – Special Education Coordination	Wireless costs associated with a specific laptop computer or iPad used for the grant project. Not for other IT network costs.
Conference/Workshop -Site Rental	221300-Professional Development	Costs related to space or facility rental for grant project conferences or workshops.
Conference/Workshop - Food	221300-Professional Development	Costs related to food for grant project conferences or workshops.
Conference/Workshop - Materials	221300-Professional Development	Costs related to materials and supplies for grant project conferences or workshops.
Conference/ Workshop - Presenter	221300-Professional Development	Costs related to presenter or facilitator fees/compensation/expenses for grant project conferences or workshops.

Type of Service	WUFAR Description	Explanation
		If the agency is contracting with an individual as a presenter, the cost can be added here or as "Independent Consultant." If the agency is contracting with a CESA or other agency or organization to hire a presenter, this must be added as "Contracted Services" instead. By the last budget revision, the names of all presenters should be added to the budget.
Conference/Workshop - Other Costs	221300-Professional Development	Other costs related to grant project conferences or workshops that are not included in site rental, food, materials or presenter costs. Provide a detailed explanation for these costs.
Contracted Services	436000-Special Education Tuition/Instructional Services	Any payment to an agency or organization in exchange for a service that involves a contract. Examples include payments to other CESAs, payment to a company for web/tech services, payment to an organization to perform an outside program evaluation or research study. If an individual is being paid directly, "Independent Contractor" may be used instead. To determine which is the correct option, determine to whom the payment is being made. If the payment is made directly to an individual, choose "Independent Contractor." If the payment is being made to an organization, business or other agency (even if only one individual is involved) choose "Contracted Service." Note that indirect costs will only be taken against the first $25,000 of each contract. The software calculates this automatically.
Consultant	223300-Special Ed Coordination	Any payment directly to an individual not employed as salaried personnel by the agency to perform a service. For example, payment to a consultant to provide a training or facilitate a meeting. Same as "Independent Consultant."
Independent Consultant	223300-Special Ed Coordination	Same as "consultant." Any payment directly to an individual not employed as salaried personnel by the agency to perform a service. For example, payment to a

Type of Service	WUFAR Description	Explanation
		consultant to provide a training or facilitate a meeting.
Meeting - Food	221300-Professional Development	Costs related to food for grant project meetings.
Meeting - Materials	221300-Professional Development	Costs related to materials and supplies for grant project meetings.
Meeting - Site Rental	221300-Professional Development	Costs related to space or facility rental for grant project meetings.
Meeting - Other Costs	221300-Professional Development	Other costs related to grant project meetings that are not included in site rental, food, or materials costs. Provide a detailed description of these costs.
Phone	223300-Special Ed Coordination	Land line and/or line or cell phone costs that can be tracked directly to this grant project.
Postage/Shipping	223300-Special Ed Coordination	Postage and/or shipping costs that can be tracked directly to this grant project.
Printing/Copying	221300-Professional Development	Printing and/or copying costs of any grant-related materials that can be tracked directly to this grant project.
Professional Development – Project Staff	221300-Professional Development	Professional development activities for project staff
Professional Development – Contractors/Consultants	221300-Professional Development	Professional development activities for consultants or contracted staff
Rent/Space Occupancy	255400 – Rent/Occupancy	Costs related to space rental/occupancy for the agency that can be tracked directly to this grant project.
Rent/Space Occupancy – External Office	255400 – Rent/Occupancy	Costs related to space rental/occupancy not housed in the agency (i.e. external rented office space, also including rented space at another CESA) that can be tracked directly to this grant project.
School Recognition Sites – Registration Fee Reimbursement	221300-Professional Development	Specific to the RtI Center and PBIS Network projects
Single Audit	231700-Audit	Single audit-related costs that can be tracked directly to this grant project. The costs of auditing the IDEA required by and performed in accordance with the Single Audit Act, as implemented by OMB Circular A-133, "Audit s of State, Local Governments, and Non-Profit Organizations." Other IDEA audit costs are not allowed as direct costs. They should be including in the indirect cost rate.

Type of Service	WUFAR Description	Explanation
Stipends	223300-Special Ed Coordination	Stipends or reimbursements to individuals, districts, or other entities.
Sub-grant payment to CESA	436000-Special Education Tuition/Instructional Services	A sub-grant payment to other CESAs. Only applicable to WSPEI (payment to 11 CESA Coordinators).
Travel – Project Staff	221300-Professional Development	Travel costs, including mileage reimbursements, lodging and food, for project staff.
Travel – Consultants/Contracted Staff	221300-Professional Development	Travel costs, including mileage reimbursements, lodging and food, for any consultants or contracted staff related to this project.
Travel - Participants	221300-Professional Development	Travel costs, including mileage reimbursements, lodging and food, for any participants (such as district directors of special education or parents) to attend trainings, workshops, conferences, meetings or other events.
Training - Food	221300-Professional Development	Costs related to food for grant project trainings.
Training - Site Rental	221300-Professional Development	Costs related to space or facility rental for grant project trainings.
Training - Presenter	221300-Professional Development	Costs related to hiring a presenter or trainer for grant project trainings. If the agency is contracting with an individual as a presenter, the cost can be added here or as "Independent Consultant." If the agency is contracting with a CESA or other agency or organization to hire a presenter, this must be added as "Contracted Services" instead. By the last budget revision, the names of all presenters should be added to the budget.
Training - Other Costs	221300-Professional Development	Other costs related to grant project trainings that are not included in site rental, food, materials or presenter costs. Provide a detailed description of these costs.

Non Capital Objects

Object	WUFAR Description	Explanation
Materials/Supplies	221300-Professional Development	Costs related to materials or supplies developed used for the purposes of the grant project. These are materials or supplies that will be expended within the grant project period. Examples include paper, pens, books, notebooks, binders, and printer ink cartridges.
Non-Capital Equipment	221300-Professional Development	Equipment to support the grant project with a per-unit cost of less than $5,000. This includes all technological equipment such as computers, laptops, iPads, printers/copiers, as well as office furniture and other equipment. A detailed description is required in the grant budget. Detailed descriptions for non-capital equipment must include the equipment type and the number of units for the cost identified in that line item. An assurance is also required for each item specifying that the equipment will only be used for the purposes of the grant project. Each individual piece of equipment must be entered as a separate budget line item.
Software	223300-Special Ed Coordination	Non-instructional software used directly to support grant project activities.

Capital Objects

Object	WUFAR Description	Explanation
Equipment	221300-Professional Development	This includes any equipment to support the grant project. Grantees must receive prior approval from their DPI Grant Liaison to use funds to purchase capital equipment. Examples might include assistive technology devices, computers, furniture, or vehicles. Capital equipment is equipment with a useful life of more than one year that costs $5,000 or more per unit. If the agency has established a level less than $5,000 for capital equipment, then equipment that meets the agency's definition must be budgeted as capital equipment. A detailed description is required in the grant budget. Detailed descriptions for equipment must include the equipment type and the number of units for the cost identified in that line item. An assurance is also required for each item specifying that the equipment will only be used for the purposes of the grant project.Each individual piece of equipment must be entered as a separate budget line item. Note that indirect costs cannot be charged against capital objects. The software will automatically remove capital equipment costs from the indirect cost calculation.

Insurance

Object	WUFAR Description	Explanation
Insurance and Judgments	270000-Insurance	Employer expenses for worker's compensation granted as fringe benefits under established written policies are allowable. Worker's compensation benefits must be allocated to the grant in a manner consistent with the pattern of benefits for all agency employees. May also include insurance premiums for liability, property, fidelity or unemployment compensation that can be directly tracked to the program.

Other Objects

Object	WUFAR Description	Explanation
Dues	223300-Special Ed Coordination	Costs related to membership or other professional dues related to the grant project.
Fees	223300-Special Ed Coordination	Costs related to any type of fees related to the grant project.
Licenses	223300-Special Ed Coordination	Costs related to license renewals for grant project staff.
Subscriptions	223300-Special Ed Coordination	Costs related to any type of subscriptions related to the grant project.

V.   Important Contacts and References

Indirect Costs

Indirect costs are those costs incurred to benefit more than one program or objective not readily assignable to a single program. The indirect cost rate is negotiated between an agency and DPI's Division of Finance and Management. For information about indirect costs for IDEA Discretionary Grants, view the guidance document *IDEA Discretionary Grants: Indirect Costs* at

www.dpi.wi.gov/sped/pdf/indirect_cost_guid_idea_discgr.pdf.

Time & Effort Reporting

For those personnel (such as bookkeepers, clerical support staff and IT staff) that must keep time and effort records under IDEA discretionary grants, view the technical assistance available at

www.dpi.wi.gov/sped/grt_disc.html#techasst.

Project Income

The IDEA Discretionary Grants Web Portal will allow grantees to track project (or program) income. For technical assistance regarding of Project Income for IDEA discretionary grants, view the technical assistance document at

http://www.dpi.wi.gov/sped/grt_disc.html#techasst

Procurement and Contracts

As part of their IDEA discretionary grant project, many fiscal agencies will purchase contracted services. For technical assistance regarding procurement requirements and required contract provisions for federal sub-grantees under the Education Department General Administrative Regulations (EDGAR), visit

www.dpi.wi.gov/sped/grt_disc.html#procurement (**Procurement Technical Assistance Guide**)

Outline of Provisions for IDEA-Funded Contracts

Note: *The Procurement Technical Assistance Guide is not yet available. It will be published on this page by October 2011.*

Fiscal Agent Responsibility

In cooperation with CESAs, school districts, and department staff, the DPI's School Financial Services team has developed a fiscal agent policy. This policy is intended to promote uniformity in procedures and to clarify responsibilities for programs in which a fiscal agent is involved. A fiscal agent is an entity such as a school district or CESA, which is responsible for the establishment and maintenance of revenue and expenditure accounting records and for the filing of associated reports to the department and cooperative participants. The policy applies to federal and state grant consortia and "66.0301," formerly "66.30," cooperative agreements.

The policy establishes three levels of documentation for expenditures to be used as necessary to meet fiscal and compliance audit requirements. The fiscal agent should consult with its external auditor as to the documentation necessary to meet audit requirements when developing the fiscal agent agreement. This policy is available at **http://dpi.wi.gov/sfs/doc/fisagnt.doc**.

For questions, contact Kathy Guralski, DPI School Financial Services Team, at (608) 266-3862.

Financial Management Handbook

The *Financial Management Handbook for Federal and State Grant Programs* provides a reference to the fiscal requirements and procedures necessary for sound financial management of the DPI-administered grant programs. It is intended to assist grant recipients in the proper disbursement, accounting, and accountability for federal and state funds as prescribed by law. The Financial Management Handbook is available as an electronic publication at the following link:

http://www.dpi.wi.gov/sms/doc/fhndbook.doc

The Financial Management Handbook web version attempts to cover the topics that generate some of the most frequently asked questions and is not intended to be a complete guide or resource of all federal and state grant laws, rules, and policy. For more information about the Financial Management Handbook, contact Bob Sainsbury, Grants Supervisor, (608) 266-2428.

Contacts

DPI Grants Administrator: For process-related questions regarding the IDEA Discretionary Grants, contact Claudia Kessel, (608) 267-2349, claudia.kessel@dpi.wi.gov. You may also contact Sherri Honaker, Office Operations Associate, at dpiidea@dpi.wi.gov or at (608) 267-7904.

DPI Grant Liaison: For questions regarding grant project activities, contact the DPI Grant Liaison listed on the grant project's Primary Contacts section.

DPI Accountant: For questions regarding claims, contact Mark Magnuson at mark.magnuson@dpi.wi.gov.

DPI Division of Finance and Management: For questions about an agency's indirect cost rate, contact Gene Fornecker at Eugene.fornecker@dpi.wi.gov.

To report a **software problem**, click "Report a Software Problem" link at the bottom of any screen. Fill out and submit the software problem report.

VI. Frequently Asked Questions

1. In the grants budget, where is the "Save" button? Can I save my entries and come back to submit later?
Yes, you can save the budget entries. There is no "Save" button. Once you click the "Add" button, the budget items should be saved. You can log off the Portal and log back in to complete the budget and submit at a later time or date.

2. When uploading a work plan, what do I do when I get a message saying my document is too large to upload?
2MB is the maximum document size that may be uploaded to the Portal. If saving a Word document to a PDF there is an option for "minimum size". That will reduce its size about 90%. If you have a full version of Adobe, you can choose how big to make the file.

3. Can I assign a specific user in my fiscal agency to only see his or her project information?
Only two individuals at each agency, designated as the Grant Coordinator and the Grant Accountant, will be able to view and make changes to all discretionary grant projects for that agency. All other users, such as Grant Project Directors and other grant staff must be assigned to a pecific project by the Grant Coordinator. Once assigned, each of these individuals will only be able to have access his/her grant project information.

If a user is unable to access their grant project, then the Grant Coordinator for that agency likely needs to assign that user to the specific project. To do this, the Grant Coordinator should login, click on the specific grant project name, and then under "Grants Main Menu," select "Enter/View Grant Project Contacts."

This will bring up a screen entitled "Primary Contacts for Grant Application." The Grant Coordinator will need to assign a user to each of these positions (Grant Director, Fiscal Agent Accountant, etc.) and save them in order for the users to access their grant projects.

Primary Contacts for Grant Application

⚠ If You Don't See A User In The Dropdown Menu, You Will Need To Add Them As A User First.

DPI Grant Liaison

Name: Erin	
Phone: Ext:	E-Mail:

Grant Coordinator

⌄	
Phone: Ext:	E-Mail:

Grant Director

⌄	
Phone:	E-Mail:

Fiscal Agent Accountant

4. In the Personnel section of the grant budget, the "Name" field is not activated. How do I add the name?

In certain grant projects, a license file number (EFN) is required for specific project positions. If this is the case, you won't be able to type in the name of that individual. Instead, type in his/her license number. Then click the "Add" button. You should see the entry below should automatically include the individual's name, if he/she holds a current DPI license. This ensures that an un-licensed individual will not be able to be added to the budget.

5. How can I print out my grant budget to review before submitting?

Under the "Grant Project Main Menu," (see page 10 of the User's Guide), go to the fourth heading entitled "Report Menu." Click on "View Budget Detail Report." Here you will see a summary of your budget. You may print this page to review the budget before submitting.